



# Bottled Water in Kazakhstan

December 2025

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## Bottled Water in Kazakhstan - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Ongoing issues with tap water support volume sales

#### INDUSTRY PERFORMANCE

Continuing volume growth for bottled water

Flavoured bottled water registers highest volume growth

#### WHAT'S NEXT?

Further healthy volume growth

Minimal innovation over forecast period

Limited demand for functional bottled water as yet

#### COMPETITIVE LANDSCAPE

RG Brands continues to lead, with Unix close behind

Coca-Cola performs strongly

#### CHANNELS

Small local grocers lead retail distribution, but are losing volume share

Some volume sales through foodservice

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2025 marks a recovery, as inflation eases

### KEY DATA FINDINGS

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Recovery, after previous difficult year

Consumers still price sensitive

RTD tea strongest performer

Continuing flavour innovation

#### WHAT'S NEXT?

Moderate volume growth over forecast period

Continuing price sensitivity

Continuing regulatory pressure on energy drinks

## COMPETITIVE LANDSCAPE

Coca-Cola holds on to commanding lead and makes strong recovery after difficult 2024

RG Brands has significant foothold

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## SOURCES

Summary 1 - Research Sources

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